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ABSTRACT

Reported is a project designed to explore the feasibility of establishing a self and home employment program for disabled homebound persons in clerical, business, and service occupations. The local homebound population was surveyed, businesses contacted, jobs studied, and five clients trained and placed. Results were successful and the jobs showed a potential for regional development. The jobs developed were insurance teleservice claims representative, bank credit collection clerk, and school substitute acquisition clerk. Companies involved were satisfied with the quality of work and interested in hiring more homebound. (KW)

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Rehabilitation Series 1

A DEVELOPMENT PROJECT IN SELF AND HOME EMPLOYMENT FOR THE HOMEBOUND

Frank D. Gentile
Roberta Housman

INA MEND INSTITUTE
at
HUMAN RESOURCES CENTER
ALBERTSON, NEW YORK 11507

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U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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FOREWORD

Some two million disabled people in the United States today are homebound and only some 12,000 are employed in any way. In addition to their physical problems, architectural barriers and the problems of transportation prevent most of these persons from going to a job. They remain at home unproductive, their lives and potential wasted.

To help meet the needs of these isolated people, Human Resources Center began a pilot project to explore and develop new job opportunities which could be performed gainfully by someone at home.

Our results showed that not only were jobs available and there were homebound people who could be successfully placed, but that these occupations could be developed regionally and across the nation. We have also determined that these excellent career opportunities are greatly rewarding to the homebound individual.

While our work is still in its early stages, the results are encouraging. We hope that our findings will stimulate others to explore the challenge and dedicate their efforts to bring lives of meaning to the severely disabled homebound of our country.

Henry Viscardi, Jr.
President

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INTRODUCTION

During the sixteen years of its existence, Human Resources Center has actively explored with representatives of New York State Division of Vocational Rehabilitation new approaches of serving the unmet needs of the severely handicapped. As a leader in the field of training, employment, and placement of significant numbers of handicapped people in competitive jobs, Human Resources Center has implemented numerous federal and state projects in all phases of its operation.

Highlighted in numerous discussions with New York State Division of Vocational Rehabilitation were the vocational problems of the homebound disabled in suburban and rural areas. It was realized that this type of a program had vast national implications and that any exploration of the problem should be extended to at least a regional basis. In order to serve the diversified needs of the client and agency in different geographical areas and the requirements of companies with operations across the country, the state general vocational rehabilitation agencies and blind agencies of New York, New Jersey, Pennsylvania and Delaware agreed to cooperate in a Homebound Project. This led to a request for a project development grant in Self and Home Employment.

Prior to the request for funding, the staff of Human Resources Center held meetings with the regional representatives of state vocational rehabilitation and blind agencies to explore possible solutions to meeting the needs of this homebound population. Concurrently, discussions were opened on the administrative level, with personnel from commercial organizations that operate nationally. It was agreed the approach to the problem would have to be in occupational areas previously not explored for the homebound.

The two major approaches have historically been in the fields of handicrafts and industrial homework. Those severely homebound disabled with higher level skills and intelligence were generally forced to choose between jobs offering no incentive plus minimal wages and financial assistance. Due to a lack of opportunity to achieve economic self-sufficiency they became financially dependent on assistance programs or family resources. Thus, it was decided to concentrate all efforts towards the development of clerical and service occupations which would provide increased opportunities for self-sufficiency.

The Problem

The purpose of this project was to investigate the feasibility of establishing a self and home employment program for the severely disabled homebound in clerical and service occupations. Occupational fields were limited to those which had potential on a national or regional basis, such as Banking and Insurance. Emphasis was placed on exploring the needs of those persons with catastrophic disabilities, the severely disabled, blind and aged, as well as the mentally handicapped and the socially disadvantaged. To accomplish this goal several problems had to be studied simultaneously. Companies were surveyed to isolate jobs which had a projected growth labor need and which could be handled in home situations without a loss of practicality (i.e., cost factors and problems of quality control). These same companies were approached to consider making these jobs available to the project on a limited basis for research purposes. A second problem was to determine the type of homebound population currently awaiting services. It was felt that this would require a limited survey to obtain demographic data on the local homebound population.

In order to service and place the severely disabled client, special training programs for the homebound had to be developed and equipment necessary to each job modified based on the physical limitations of the client in training.

An important aspect of the program was to facilitate the dissemination of information as the project developed.

In order to promote an exchange of information, stress was placed on assisting agencies in the region to begin homebound programs of a similar nature.

A committee was established consisting of representation from the vocational rehabilitation and blind agencies from New York, New Jersey, Pennsylvania, and Delaware.

It was anticipated that this project would result in the establishment of a new direction in thinking for the homebound vocational programs throughout the region. Although limited in quantity of people served, it would provide a basis for enlarged homebound programs in the clerical and service areas.

Related Literature

Most available literature indicates that the number of homebound persons in the United States exceeds one million with the majority not receiving adequate vocational rehabilitation service. Of this number it is felt that approximately 200,000 homebound individuals were on public assistance due to such problems as cardiovascular disease, arthritis, rheumatism, and mental problems. Most estimates place the number of homebound employed by industry at under 12,000.

Kristeller (1960) recommends that attention be given to increasing the work areas for homebound adults and turning the direction away from the traditional activities such as crafts and low skilled jobs. The author goes on to state that the homebound disabled lacking in manipulative skills is often excluded from programs due to the type of work generally available to the homebound such as industrial homework which is monotonous and requires only a low level of skill and intelligence.

Rusalem, in his review, recommends that future programs should be innovative and creative and that the approaches should be a coordinated effort between public and private agencies. His report also highlights the neglect shown toward the rural and suburban population.

The statistics found in the literature presents a picture of a population generally ignored by industry and unable to benefit from available vocational training due to a lack of job opportunities.

The Setting

Human Resources Center established in Albertson, Long Island, New York is composed of three coordinated units: Abilities Inc.; Human Resources School; and Human Resources Research and Training Institute.

Abilities Inc., is a non-profit demonstration industrial and clerical work center providing employment opportunities in glass engraving, data processing, banking services, mechanical assembly, harness and cable assembly, and process packaging. Its handicapped population consists of the severely physically disabled, mentally retarded, and emotionally restored. Abilities, with its industrial and clerical work environment serves as a research and training laboratory in which the population can be evaluated under actual working conditions.

Human Resources School is a non-profit educational institution chartered by the Board of Regents of the State of New York offering a full academic curriculum for previously homebound children from the pre-school through senior high school level.

Human Resources Research and Training Institute conducts research relating to the diagnosis, treatment and rehabilitation of the physically disabled, mentally retarded and emotionally restored. The Institute also conducts comprehensive evaluation and training programs.

Training Services

Services rendered at Human Resources Center consists of Vocational Evaluation, Personal Adjustment Training, On-The-Job Training, Placement, and a Work-Study Program.

In Vocational Evaluation, each individual may spend from four to seven weeks being tested for basic skills and dexterity in both the industrial and clerical training areas. The tests consist of several standardized procedures.

Personal Adjustment Training assists in the development of the trainee's social awareness of the role as an employee, functioning under supervision, getting along with co-workers, and coping with the problems of everyday living. The trainee can be involved in this for as long as 13 weeks.

On-the-Job Training at Abilities Inc. requires placing the worker in a department that is suited to his skills and where he is trained on four or five different job operations, (e.g., printed circuit board assembly, mechanical assembly, cable assembly) functioning under actual work situations with the pressures found in competitive industry.

Following training of the client a placement specialist arranges for placement either in local competitive industry, Abilities Inc., or other employment areas. Placements are followed up periodically.

In addition, Human Resources Center conducts a Work-Study Program for handicapped young adults. The three main points in this project are: basic orientation, job training, and personal-social adjustment training. Following completion of the work-study program, the students may be employed at Abilities Inc., continue in various job operations, or be placed in competitive industry.

Other services include industrial medical services for all employees, employee benefits such as Medical, Hospital, Group Life Insurance, Employee Education Assistance Program, Credit Union, and referral services.

Special Services

The staff has instituted some new programs which are of special significance.

An adapted training residence for handicapped women has been established at the Center. This reaches those severely handicapped not being serviced in outlying areas such as eastern Suffolk, Westchester and other parts of New York State. Eight women reside under supervision during training. On completion, suitable residence is found near work so that others can be accommodated. Future plans include a similar residence for men.

Another service for potential trainees is the use of the Center's bus which is available to bring the disabled to Human Resources for a short evaluation period for eligibility. This has been used for clients from Just One Break in New York City and those from Suffolk County. It is anticipated that this bus would also be utilized for evaluating and training those homebound eligible for this program.

Community Relationships

Division of Vocational Rehabilitation

A close liaison is maintained with the Long Island, New York City and Westchester D.V.R. offices. Some 95% of the handicapped serviced by Human Resources Center have come from D.V.R. referrals. The current total population being served is 605 handicapped persons. A liaison has also been established with the local Vocational Rehabilitation Service and the Center is now training three blind persons.

Affiliations

Human Resources Center has established and maintained regional cooperative relationships with universities, medical schools and other research facilities through formal affiliations with such organizations as: New York University and the Institute of Rehabilitation Medicine; Queens Hospital Center; Hofstra University; Columbia University and the Institute for Education of the Handicapped.

Human Resources Center also conducts research demonstrations and seminars under the auspices of the INA MEND Institute.

Seminars and Publications

One of the major responsibilities of Human Resources Center is the dissemination of information drawn from the unique opportunities available to the staff for studying the handicapped and the problems connected with their employment and rehabilitation. Through the professional staff of the Research and Training Institute numerous research and demonstration projects have been conducted over the years adding to our knowledge of the disabled and retarded. The vast majority of the projects have been supported by the Vocational Rehabilitation Administration and the New York State Division of Vocational Rehabilitation.

The dissemination of the results of the projects and other demonstrations has been accomplished through tours of the Center's facilities and by conducting seminars for professionals and other interested visitors. Other methods include publications by the staff and management, presentations of research activities at professional meetings and through the mass media.

Staff

Human Resources Center staff consists of specialists in the fields of psychology, medicine, vocational rehabilitation, and special education. Research assistants supplement this personnel on a part-time basis. The staff and programs are coordinated by the President and Vice President.

The present professional staff which is responsible for the previously mentioned services consists of full time personnel including Training Director, Industrial Vocational Instructor, Clerical Vocational Instructor, Placement Director, and Nurse. Part-time personnel include Psychologists, Physician, Physiatrist, Mental Retardation Educator, and Industrial Training Assistant. Also, there is a complete management staff for Abilities Inc.

Population

Presently, the staff of Human Resources Center is servicing the handicapped in the following programs: 36 mentally retarded youths in work-study; 16 handicapped in evaluation; 34 in industrial and clerical training; and 369 in employment. There are 170 disabled children in the school.

The population of the Center ranges in age from 3 to 80 and the disability categories represented cover the entire range of disability classifications, including the catastrophic disabilities, multiple handicaps, geriatrics, blind, and retarded.

Listed below are the variety of disability types trained and employed by Human Resources Center.

Disability Classifications

	%
Muscular Diseases	22
Allergies	1
Infectious Diseases	2
Degenerative Diseases	5
Metabolic Diseases	2
Cardiac and Vascular Diseases	15
Traumatic Deformities	11
Visual Defects	2
Hearing Defects	7
Speech Defects	1
Congenital Deformities	5
Mental Illness	4
Mental Retardation	10
Miscellaneous Disabilities (aged, multiple, etc.)	13
	100

ACCOMPLISHMENTS

Project Program and Professional Staff

In order to develop a self and home employment program a variety of professional staff was required. The project director was responsible for administering the project, planning the activities and coordinating staff activities. A research associate was employed to carry out the project activities including the survey, establishing contacts with the business community, the development of training programs and follow up on placements. Additional staff members included a placement coordinator and a trainer. A secretary was responsible for all clerical duties connected with the project.

Survey of Population

An initial step taken in this project was to survey the homebound population in Nassau County to determine its demographic aspects. The survey was limited to cases known to New York State Division of Vocational Rehabilitation, Nassau County Department of Public Health, and the New York State Employment Service. It was anticipated that this limited type of survey would provide a good cross section of homebound people with open cases presently ready for work and/or training. A one page form (see Appendix A) to be filled out by the client was used which did not require a large time expenditure on the part of the staff or cooperating agencies, and would allow for an expanded survey as jobs and training programs became available. It was also felt that the initial survey would provide a realistic basis for the selection of jobs to be explored and the type of training programs required to meet the job needs.

A total of 45 homebound applicants were referred as a result of the initial survey. Of this group; 3 had professional training or Masters degrees, 6 graduated from college, 9 had some college experience, and 12 had completed high school.

The largest disability groups were cardiacs, muscular dystrophies, cerebral palsied, post polios (one severe quadriplegic), amputees, and cerebral-vascular accidents. Fourteen people were over 55 years old.

The past business experiences of the group showed that: 5 had professional, technical and managerial occupations; 18 had experience in clerical and sales occupations; 2 worked in service occupations and 4 had been bench workers.

Based on these results it appears that the suburban homebound in Nassau County differ from those in the disadvantaged urban areas or rural farm communities in educational preparation and past work experiences.

Jobs Investigated

During this project five jobs were investigated in depth to determine if suitable for homebound employment. Of the five potential jobs three were fully developed as jobs for the severely disabled homebound.

Telephone Claims Representative:

The first job area to be explored was an insurance telephone claims representative. Several major insurance companies have begun to provide a 24 hour claims service which permits the settlement of routine claims with clients by telephone. The positions have a starting salary of approximately $5,200. a year and require an above high school education and above average judgment ability.

The project staff worked closely with the Insurance Company of North America to develop this job as a homebound position. Since this company is national and has local offices throughout the country this job can be developed in both urban and rural areas.

The staff of Human Resources Center and the company worked together to formulate an effective preliminary training and evaluation program. (See Appendix B). Because I.N.A. has developed and put into operation an employee in-service training program which extends beyond the first year of employment this also had to be modified to permit the homebound employee to participate.

The job as developed for the homebound offers approximately seven hours of work per day, five days a week. The employee uses a telephone and a voice recorder, supplied by the company, to take statements regarding claims. He also settles insurance claims not assigned for outside investigation and operates in a decision making capacity within established claim policies and procedures.

To date two clients have been placed as I.N.A. employees. One is a male cardiac, age 57, with 37 years of business experience. The other is a female post-polio quadriplegic, age 26. There will be openings for two additional homebound employees in the New York area. The two individuals evaluated and not placed were unable to perform the judgement aspects of the job.

Rating and Coding Clerk:

Other jobs investigated in the insurance field included rating clerk and a coding clerk. Initially there appeared to be a large labor need in these areas, however, further study revealed that these occupations were rapidly phasing out due to computerization. Thus, no evaluation or training progress was initiated. There is a need for home typing but since this job is not innovative it was not considered.

School Substitute Acquisition Clerk:

The project staff investigated job opportunities in local school districts. For many years public schools have experienced difficulty in assigning the job of locating school substitutes and taking calls from the faculty reporting in absent. This job requires that the person be able to handle people over the telephone, accurately take information, and be available in the evening and early morning hours. The job has a starting wage of $2.25 per hour and requires approximately 20 hours work per week. The homebound individual is guaranteed employment ten months of the year.

In cooperation with the staff of the school districts, the project staff developed an evaluation and training program. (See Appendix C). To date five severely disabled homebound clients have been evaluated and trained. One was not recommended for employment and four are now working for local school districts. The school districts pay for a business telephone and other necessary equipment. It should be noted that the training program for this job is applicable to other job areas such as answering services, temporary employment agencies, professional registries, etc.

Banking Collection Clerk:

The project staff held numerous discussions with administrative personnel of The Franklin National Bank serving the New York and Long Island area in order to develop clerical and service opportunities for the homebound. One job has been fully explored and an evaluation and training program developed. (See Appendix D). At the present time one homebound person is awaiting placement as a bank collection clerk. The homebound person will contact, using the telephone, delinquent accounts in the personal loan department of the bank in order to resolve problems in payments. The starting salary for this job is $2.10 per hour for a 25 hour week.

Advertising:

One job explored in advertising was telephone solicitation in marketing campaigns and opinion polls. The project staff found that the jobs are primarily temporary and would not offer the homebound person steady employment. The staff intends to further investigate this major business field.

TRAINING PROGRAM

In the development of a successful self and home employment program, one of the most important factors is the quality of the client recommended to the employer. If other placements are to be made in a similar job area, the workshop or agency must be able to point to success in order to obtain future cooperation. Stress must be placed on adequate evaluation and training of the homebound person.

In planning the homebound evaluation and training program several factors were considered. The homebound person can usually attend a limited program if: they can obtain adequate transportation; the hours are arranged so that the person is not physically overtaxed; the weather conditions do not make travel hazardous; and the program is of short duration. Generally, the financial problems of transportation are the greatest factor and these were resolved by obtaining financial assistance where possible or the services of family and friends of the client who were willing to help for a short period of time. The major objectives of an evaluation program are to ascertain if the client is able and motivated to work. Because the homebound employee works under minimal supervision, reliability becomes an important factor.

While attending the program at Human Resources Center the homebound person receives specific instructions and practice in performing the job activities. Job tasks are outlined step by step in writing so that the employee can refer to an outline if confused.

Because of the trainees' wide range in educational and employment backgrounds the program for each was adjusted to meet their needs. A man with 37 years of business experience received less training than a young female who had never worked. A post-polio quadriplegic required a longer training period and more modifications of equipment than a cardiac. During the training program home visits were made by the trainer to determine how the person could best set up a home-office work area and what special modifications of equipment were necessary.

Training programs specific to each job were developed. Whenever possible, clients were able to visit the office of the employer to see the job as performed in the office and to meet the staff they would be working with. All placements were made following an interview with the employer.

After placement the project staff followed up by making home visits and having telephone conversations with both the employer and employee for at least four weeks.

If the homebound person experienced any problems, they were able to contact both their employer and the project staff. This phase of the program appeared to relieve the anxieties of the employer and the employee.

HOMEBOUND TRAINEES

During the project development year, the Human Resources staff evaluated and trained nine homebound severely disabled individuals. Of this number, six are now working in homebound jobs and three were not recommended for employment. Additional training and placements are planned for this year in the three job areas. Trainees were selected from differing disabilities and age groups in order to gain experience in a variety of possible job and equipment modifications. For example, the problem involved in training job placement and necessary equipment modifications between a client with cerebral palsy and a quadriplegic are quite different.

The male trained and now working as an insurance claims representative is a severe cardiac who was homebound for the last five years. He is 57 years old with two years of college and 37 years experience managing small luncheonettes. A post-polio quadriplegic female, age 26, was recently placed at I.N.A. She is a college graduate with no work experience. Although she is severely limited physically she has learned to type on an electric typewriter, using a mouthstick, and shows very good potential in the judgment aspects of the job. A man now in evaluation holds an advanced degree, is 54 years old, and has been homebound for the last four years due to a progressive disease.

All those trained and now working as School Substitute Acquisition Clerks are female. One is a cerebral palsy quadriplegic, age 23, with a high school education. Another woman, age 51, who has chronic rheumatoid arthritis affecting all joints, has been homebound and unable to work for the past 25 years due to her disability. Another is a 40 year old high school graduate who was able to work until one year ago when she suffered a severe back injury. Although she cannot travel or sit in one position she is now successfully employed. After 12 years of experience as a secretary, another homebound clerk suffered multiple facial and body burns which have left her severely scarred, with poor vision, and chronic tearing of the eyes.

Of those evaluated and not referred for jobs as school acquisition clerks, one woman, a 64 year old cardiac, was unable to work without constant supervision and could not function in a homebound job adequately. Another client was a 59 year old post-cerebral vascular accident who also showed signs of mental confusion and an inability to handle the job situations.

One client is now in training for the bank credit collection clerk job. She is a 73 year old female with an osteoarthritic hip. She was employed until last year as a clerk in an insurance firm but due to her inability to travel daily had to resign from the job.

SEMINARS & CONFERENCES

The project staff held several meetings with regional committee representatives to keep each state office informed of the direction of the project and to determine the regional viewpoint concerning each occupational opportunity.

In December the project staff held a two day conference for the regional representatives and training staff from workshops recommended by them. At the conference the overall homebound program was described and the school substitute job was presented in detail so that the workshop trainers could implement similar programs in their area. Over 20 rehabilitation professionals were represented from the region. Among the workshops represented were the Shut In Society of Philadelphia, Pa., Referrals, Inc. of Hanover, New Jersey and the Jewish Vocational Service Workshop from Newark, New Jersey. It was felt that by stressing the training of trainers at this conference an immediate outcome could be realized regionally in terms of extending opportunities for direct service to rehabilitation clients. The project staff has offered to assist the workshops in setting up such services where necessary.

In addition to those seminars and conferences mentioned, Human Resources Center had over 6000 visitors last year representing industry, medicine, and ancillary fields, educators and university students, to whom the project was presented.

IMPLICATIONS OF RESULTS

The findings of this project reveal a growing need for the development of vocational programs for the homebound, particularly in clerical and service occupations. Part of this need can be met as shown by the developments of this project. Industries when made aware of the type of people homebound due to disabilities and the skills they can offer are interested in assisting in the development of homebound programs. This interest can often be attributed to their concern for the individual as well as the economic factors of business today, with its high costs, which weigh in favor of employing a homebound person who does not occupy high cost office space.

Often the homebound person is willing to work at jobs that lack in glamour but still require good judgement and reliability. This was particularly true in the development of the school substitute job due to the early and late hours involved.

The project staff found that many homebound people do possess the ability to work at skilled jobs but are unable to obtain such jobs on their own. Discussions of the program with the trainees revealed that all felt their greatest problem was a lack of a job. None requested or stated an interest in ancillary services such as recreation programs, home visits, or social services. It appeared that this was a group highly motivated to work.

Of the trainees who were not placed in jobs, the greatest problem was an inability to work without constant supervision due to their physical disability and mental confusion. This problem is difficult to resolve at home. The project staff felt that even if lower level jobs were available they would have similar problems. This assumption should be examined and tested further in future studies.

These homebound placed in jobs are working at wages above the minimum wage level. It should be noted that they are not employed by a workshop or the Center and they are competing in the business world with the non-disabled.

Although the jobs developed in the project are all in clerical and service related areas, they do vary in requirements. The highest level job of Teleservice Claims Representative requires a person of college level aptitudes and high level skill in the motivation of people, while those with high school ability can easily handle the school clerk job.

With today's technological advances, the project staff found that equipment was generally easily available to service the needs of even the most severely disabled. In some instances the staff was able to make minor adaptations, but most often the selection of a different model or manufacturer allowed the disabled person to perform the task. This was especially true in the selection of recording devices for use in telephone work. The quadriplegic cerebral palsy female trained in the school clerk job experienced great difficulty in operating most message recorders. After testing many models, one was found that she could operate independently.

Community impact is best analyzed in terms of the potential use of the project results. Although placements made during the project year were primarily the severely disabled, the availability of jobs for the homebound could be extended to other disadvantaged groups. The impact of such a program directed toward those on public assistance due to family responsibilities should certainly be considered. Those now working are returning to the community their share of tax dollars and in most cases have relieved their families of a great financial drain.

The project staff worked closely with the New York State Division of Vocational Rehabilitation in developing this program. The majority of clients who received direct services under the program were known to New York State Division of Vocational Rehabilitation. Prior to the project, there were no formalized programs to assist the homebound in the Nassau-Suffolk area.

Through conferences and seminars for other training agencies in the region the project staff began to explore broadening the program to include placements throughout the region. This phase of development does require further effort, although the School Substitute Acquisition Clerk job was introduced regionally. The other jobs also have regional potential.

It is the belief of the staff that a fully developed demonstration program should be carried out focusing on a greater number of placements, including other disadvantaged groups.

The number of job opportunities in clerical and service occupations should also be further explored so that other areas of employment can be made available. Within this demonstration program the regional aspects could also be broadened.

SUMMARY

Introduction

The purpose of the project was to investigate the feasibility of establishing a self and home employment program for the severely disabled homebound in clerical and service occupations and develop potential homebound jobs in business which would be available throughout the region.

Methodology

The staff surveyed the local homebound population known to public agencies to determine if a need existed for homebound jobs. The business community was contacted to locate jobs for the homebound. Each job was studied for the feasibility of training and evaluation programs. A limited number of clients were trained and placed in each job to test the feasibility of placing the homebound in clerical and service occupations at home. Regional aspects of the program were explored with business and rehabilitation agencies.

Results

A population of homebound disabled exists who have not been able to find adequate homebound jobs in clerical and service occupations despite training and background. The staff developed three jobs with training, placement, and follow-up on the job. These are Insurance Teleservice Claims Representative, Bank Credit Collection Clerk, and School Substitute Acquisition Clerk. The population serviced included chronic and catastrophic disabilities and traumatic injuries. The jobs showed a potential for regional development.

Community Impact

This program stimulated interest and concern of business and industry for the homebound. Those companies now employing the homebound are satisfied with the quality of work and are interested in hiring additional homebound.

The five clients employed at home and the two awaiting placement are trained for jobs paying above the minimum wage with salary increments based on performance. Given the opportunity the homebound can achieve a level of self sufficiency and return to a productive role. Other jobs have been explored and show a potential for local and regional development.

Discussions and Implications

New vocational opportunities for the severely disabled homebound can be developed and vocational placements can assist these clients in returning to productive lives. Industries can economically hire the homebound if the jobs are carefully selected and an agency is available to assist in evaluation and training.

Modern equipment is available which the severely disabled can utilize in performing jobs with few modifications.

Clerical and service occupations are available regionally. An expanded program would result in placements throughout the region and other homebound groups could be serviced.

The objective of the program to broaden the scope of homebound jobs to include clerical and service occupations for the severely disabled was realized through a cooperative effort with the New York State Division of Vocational Rehabilitation, business, education, and the Center's staff.

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APPENDIX A

HUMAN RESOURCES CENTER

A DEVELOPMENT PROJECT IN SELF AND HOME EMPLOYMENT FOR THE HOMEBOUND

Purpose: The purpose of this one-year project is to explore and develop new vocational opportunities for the severely disabled homebound population in clerical and service occupations. The final goal of the project will be the establishment of a program for those who are homebound on Long Island and to assist in the development of similar programs on a regional basis.

Regional Aspects: Human Resources Center is the nucleus for the four state area, supplying information and progress reports to the others in the region. In order to facilitate the exchange of information a committee has been established consisting of representatives from the vocational rehabilitation and blind agencies from New York, New Jersey, Pennsylvania and Delaware.

Population: A variety of handicapped persons will be considered for this program. This will include those who are homebound and those who might best be employed at home for various reasons. Emphasis will be placed on those persons with catastrophic disabilities as well as the severely disabled blind, aged, mentally handicapped and socially disadvantaged.

Procedure: Initially, the staff of Human Resources Center will conduct an analysis of the demographic characteristics of the homebound in the Long Island Community with the local Division of Vocational Rehabilitation office and other agencies such as the Nassau County Department of Public Health. During this year of planning and analysis, a survey will be made of major insurance companies, banks, and department stores that utilize telephone and clerical services to determine what occupations are adaptable for the homebound, the job requirements, descriptions and training procedures. Following this, job methodization and modification for the homebound will be undertaken in three stages; training procedures, background required, and equipment modifications.

Project Research Associate: Roberta Housman
Human Resources Center
Albertson, L.I., N.Y.

516/PI 7-5400, Ext. 274

APPENDIX A

HOMEBOUND APPLICATION
HUMAN RESOURCES CENTER
Albertson, L.I., N.Y. 11507

NAME: _____
First Middle Last

ADDRESS: _____
Street Town State

PHONE: _____ BIRTH DATE: _____

REASON FOR BEING HOMEBOUND: _____

_____

_____

DISABILITY:

_____

_____

Education Completed:
(Circle one) 1 2 3 4 5 6 7 8 9 10 11 _____ Diploma

College: 1 2 3 4 5 6 _____ Degree

Other Training & Skills: _____

_____

Name of Person to Contact in Emergency: (please indicate 2 individuals)

(1) Name _____ (2) Name _____
Address _____ Address _____
_____ _____

PREVIOUS EMPLOYMENT:

_____ _____

Employer Dates Position

1. _____

2. _____

3. _____

REFERRAL AGENCY: _____

COUNSELOR: _____

COMMENTS: _____

(Can you arrange transportation for an interview at the Center? _____)

Roberta Housman
Grant Coordinator

Jessie King
Director of Personnel

APPENDIX B

TELESERVICE EVALUATION AND TRAINING

A. Job Title: Homebound Teleservice Representative

B. General Responsibility and Job Description

1. Settles automobile third party claims not assigned for outside investigation (generally no-reserve claims).
2. Under direction of the Unit Supervisor. Operates within established claim policies and procedures with draft limitations of $500 on individual claim settlements.
3. The inside representative is charged with bringing these cases to a speedy and proper conclusion. He utilizes form letters, correspondence, and the telephone equipped with a statement recording device to obtain sufficient information about the nature and amount of loss to enable payment of justified claims.

C. Mini Course

1. Purpose:
   a. To assist the person in establishing good work habits and to provide a general orientation to the world of work.
   b. To evaluate the individual's capacity to handle a judgment level position and to deal with clients of the company.
   c. To acquaint individual with insurance terminology, procedures, and specifically the role of a teleservice employee.
   d. To determine what adaptations of equipment are necessary due to disability.
   e. To assist in preparing the individual for the On-The-Job Training Program of the insurance company.
2. Equipment:

   Edison Voice Writer
   Telephone
   Typewriter

3. Training Materials:

   Indoctrination and Basic Claims Course
   Human Relations in Handling Insurance Claims
   Redbook National Market Reports
   List of Appraisers
   Glossary of Insurance Terms and Abbreviations (Code Chart)
   Insurance Policies: Auto and Homeowners
   Statement recordings and copies of closed claims files

4. Assignments:

   a. An introduction to Human Resources Center

   b. Orientation to a work situation –

      Business manners
      The job interview
      Applying for a job – how to fill out an application
      Dress and appearance
      Telephone manners

   c. Readings and discussions

      1. Briefly cover book on human relations and go over summaries. This book has limited application in the training program and is useful primarily to indicate attitudes.

      2. Assignments

         a. Introduction to Insurance
         b. Automobile Insurance
         c. Automobile Liability Insurance
         d. Automobile Physical Damage Insurance
         e. Automobile Liability Claims
         f. An Introduction to Adjusting

      3. Tapes – Auto

         a. Outside Claims Rep. Work
         b. An Interview with a Policeman
         c. An Interview with an Accident Witness
         d. Commercial Auto Policies – discussions of various parts of policies and explanation of terminology

      4. Glossary of Insurance Terms

   d. Lab Work

      Listening to statements taken by teleservice people
      Study of closed files
      Practice in taking statements and use of the Voice-Writer
      Practice in summarizing claims statements
      Business letter writing
      Study of forms and other materials used in settling claims
      Study and discuss Automobile policies and Homeowners policies

   e. Personnel

      Visit to a local insurance office
      Visits to Human Resources Center by teleservice personnel to answer specific and technical questions

5. Evaluation

   Individual is evaluated by training supervisor at the end of each week.

APPENDIX C

SCHOOL SUBSTITUTE ACQUISITION CLERK EVALUATION AND TRAINING

A. Job Title: School Substitute Acquisition Clerk

B. General Responsibility and Description

1. Receive calls from school teachers reporting in absent.
2. Locate teacher substitutes.
3. Maintain a substitute up to date list for districts.
4. Report to school clerk or clerks regarding daily absentees and their substitutes.

C. Purpose

1. To acquaint individuals with school district procedures and specifically with the role of a School Substitute Acquisition Clerk.
2. To evaluate individual's capacity to handle judgment problems and to deal with professional staff of the schools.
3. To determine what adaptations of equipment are necessary.
4. To assist the client in establishing good homework habits and in setting up a home office.
5. To develop good telephone techniques and communicative skills.

D. Equipment

1. Magicall Dialer
2. Telephone
3. Recorder and Answering Device
4. Headrest for phone
5. Daily record forms
6. Rolodex file
7. Tape Writer/Handwritten Substitute Lists as required due to physical limitations.

E. Assignments

1. Orientation to a work situation

   a. Business procedures

   b. The job interview

      1. Applying for a job – how to fill out an application

      2. Dress and appearance

   c. Telephone manners

2. Use of Equipment

   a. Efficient techniques for use in programming, Magicall, depending on size of school districts and any special requirements.

   b. Use of recorder and answering device – making recordings, receiving messages and playback of same.

   c. Techniques used in setting up daily and monthly record forms conforming to needs of school district.

   d. Basic typing and filing to assist in speedy and efficient performance.

APPENDIX D

CREDIT CLERK EVALUATION AND TRAINING

A. Job Title: Telephone Adjuster – Credit Calls

B. General Responsibility and Description:

1. Review file

2. Exhaust all possible means of contacting every delinquent customer.

3. Complete each contact with a definite understanding and commitment by customer.

4. Follow-up promptly and decisively on every promise made by a customer.

5. Note on file jacket all information that will be of future use in handling the account.

6. Refer to supervisor all cases where satisfactory arrangements cannot be made or where there is doubt as to the proper course of action to be taken.

7. Responsibilities may vary, since there are many other applications in this area. Department store credit calls, notification calls, message taking, answering services, order takers, etc. are examples.

C. Course

10 Weeks – 4 hours per day

2 Weeks – Follow up

1. Purpose

a. To assist the person in establishing good work habits and to provide a general orientation to the world of work.

b. To evaluate the individual's ability to relate to the person contacted and to use appropriate tact in these contacts.

c. To acquaint individual with bank terminology and procedures.

d. To determine what adaptations of equipment are necessary due to disability.

e. To assist in preparing individual for period of on-the-job training program in bank.

2. Equipment

Business phone
Telephone directories
Small file drawer
Directories of area towns and villages

3. Training materials

Training guide – Manual of Credit Call Procedures
Coding system
Numeric file system
Training guide – use of the telephone

4. Assignments

a. Orientation to a work situation

1. Business manners
2. The job interview
3. Applying for a job – how to fill out an application
4. Dress and appearance
5. Telephone manners

b. Visit to a local branch of the bank to observe credit call section

c. Training in special techniques

1. How to elicit a promise for payment
2. Failure to meet commitment over phone
3. Customer not home – tracer
4. Legitimate excuses such as illness, unemployment, bankruptcy, military draftee, etc.